

Gold Maintenance Package

THE "GOLD" MAINTENANCE PACKAGE IS OUR MOST COMPREHENSIVE SERVICE, DESIGNED FOR MORE MATURE ORGANIZATIONS LOOKING FOR ONGOING HELP WITH BUSINESS BOOKS AND RECORDS. YOU'LL ENJOY THESE ONGOING SERVICES:



- **Business Tax Preparation.** We'll prepare your business tax return (proprietorship, partnership, or corporation). Additional entities may incur an additional charge.
 - Tax return preparation is included with our Tax Maintenance package **after 12 months** of being onboarded in our program. Tax return preparation services will incur a separate fee until the one-year mark is reached.
- **Personal Tax Preparation.** We'll prepare your federal, state, and local personal tax returns.
 - Tax return preparation is included with our Tax Maintenance package **after 12 months** of being onboarded in our program. Tax return preparation services will incur a separate fee until the one-year mark is reached.
- **6 Phone Consultations.** You can schedule **six** 15-minute phone consultations. at your convenience throughout the year, to address breaking issues and opportunities throughout the year.
- **Unlimited Email Consultations.** You can email an **unlimited** number of specific questions at your convenience for written responses.
- **Tax Alerts.** You'll get our weekly email alerts and monthly newsletter with timely tips for making the most of your money.
- **Due Date Monitoring.** You'll get our Due Date Monitoring service to ensure you never miss an important tax deadline again.
- **Quarterly Reconciliations.** We'll reconcile your books at the end of each quarter to make sure they're clean and up to date.
- **Quarterly Sit-Downs.** You'll get quarterly "sit down" meetings to review your tax picture. We'll update you with everything you need to know about deductions you can take, anticipating tax roadblocks and opportunities, avoiding IRS audits, and maintaining your personal tax plan based on your changing personal circumstances.
- **Quarterly One-on-One Financial Reviews.** Your quarterly sit-downs also include a comprehensive financial statement review. Together, we'll walk step-by-step through your financial statements. We'll show you what the numbers mean, and how you can use them to make smarter business decisions.
- **Open Questions.** Your quarterly sit-downs include open Q&A periods.
- **Quarterly Financial Performance Reviews.** Finally, the Gold Package Includes Quarterly Financial Performance Reviews. These are plain-English translations of your business financial statement, where we identify your individual strengths and weaknesses. The Review comes with a detailed comparison to your competitors.
- **Fall Tax Planning Review.** We'll develop a detailed year-end tax projection, along with a detailed tax-strategy plan to minimize your tax liability, and a calculation of estimated tax payments so you don't get caught short on April 15.
- **Quarterly Profit Assessment.** Quarterly Profit Reviews Virtual Meeting. These are evaluations of your profit performance and percentage adjustments if necessary. Signing the Engagement Letter you are in agreement to set up quarterly meetings to ensure that we stay aligned with your financial aspirations and provide the best possible support.
- **Monthly Q&A Session.** As part of our tax maintenance program, we now offer monthly online Q&A sessions with Agent Rae. These sessions are designed to address a variety of topics and answer your questions. Participation is optional and included as an enhanced service within your package. The sessions are held on the 2nd Thursday of each month from 3:00 PM to 5:00 PM. Teams meeting link will be sent to you through email.

YOUR INVESTMENT IN THE "GOLD" MAINTENANCE PACKAGE IS JUST **\$1250/MONTH**, BILLED DIRECTLY TO YOUR CREDIT CARD. THAT'S **LESS THAN \$42/DAY** FOR OUR MOST COMPLETE SUITE OF SERVICES. YOU'LL PAY MORE THAN THAT JUST TO DETAIL YOUR CAR. IF YOUR TAX IS STARTING TO HURT, THIS SHOULD BE YOUR FIRST REMEDY!